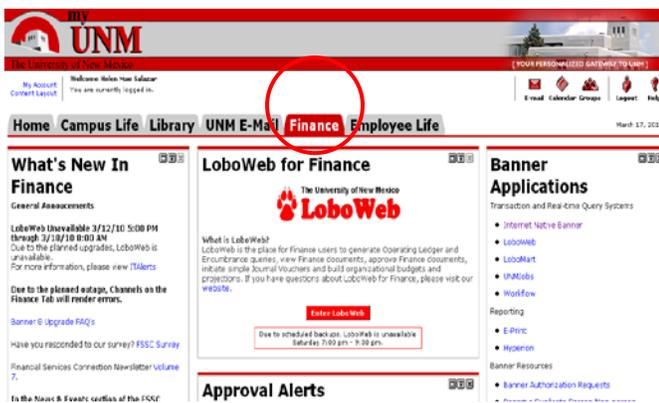**Financial Services**
Date: 09/01/2011

My Worklist Channel
FSJA-053

Users with any Finance Security will have the Finance Tab defaulted as a tab when they log into the MyUNM portal.

In order to have access to the My Worklist channel a user must have the security to approve workflow activities

1. On the Finance tab.

2. Go to the My Worklist channel.

-   This displays Workflow activities that require action.
-   Examples:
    A. Banner Authorization Requests
    B. 90 Day Memo
    C. Labor Redistributions
    D. Labor Distributions

3. Selecting the workflow, a hyperlink will start the workflow activity, requiring action.
    A. Click on item to approve OR
    B. Select 'Open Workflow'

4. Refresh
    A. Click to verify that the approval was accepted
    B. Click to check if any new workflow items need to be approved

5. Show Entire Worklist
    A. Cannot approve from this screen
    B. Will show items awaiting approval

6. The icons on the top right hand side of the channels provides the ability to set up the worklist page.
    A. Pencil Icon-Edit and set up worklist
    B. Page Icon-View the worklist full screen
    C. Arrow Icon-Minimize or maximize screen
    D. **X** Icon-Remove Channel

For information on adding a channel see job aid FSJA-014 Adding a Channel on the FSR website (www.unm.edu/~fssc).

End